



**COUNTY OF SAN MATEO**  
Inter-Departmental Correspondence  
Human Services Agency



**Date:** September 30, 2015  
**Board Meeting Date:** November 3, 2015  
**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors  
**From:** Iliana Rodriguez, Director, Human Services Agency  
**Subject:** Agreement with Information Builders, Inc., for an Implementation Plan for Business Intelligence and Data Analytics infrastructure

**RECOMMENDATION:**

Adopt a resolution authorizing an agreement with Information Builders, Inc., to provide an Implementation Plan for the Business Intelligence and Data Analytics infrastructure, for the term of November 3, 2015 through June 30, 2017, in an amount not to exceed \$940,000.

**BACKGROUND:**

In 2004, the Human Services Agency (HSA) installed a business intelligence system to provide caseload management information to its Economic Self Sufficiency Unit. Based on systems performance during the implementation of the Affordable Care Act in 2013, and the need to integrate data from all HSA divisions, HSA launched a formal Request for Proposals (RFP) in early 2015 to identify a consultant to assist with improving its business intelligence infrastructure and reporting capabilities. Information Builders, Inc. (IBI) was selected through that process.

Staff will need the assistance of experts in the newly acquired IBI business intelligence and data analytics infrastructure solution in order to provide subject matter expertise and support. The implementation and knowledge transfer from IBI staff to HSA staff will be critical to the success of this endeavor for long-term benefits of Business Intelligence and Data Analytics.

In August of 2015, IBI was engaged to conduct a preliminary study of HSA's current systems and reporting capabilities. The completed study identified the need for a full implementation roadmap that defines in detail the specific services to be delivered, the resources required in support of those services, and the major milestones, timelines, and deliverables to best meet HSA's needs.

This agreement will contribute to the HSA 2015-2020 Strategic Plan by providing a means to integrate HSA data, which can be used to align resources to solve shared challenges and promote service integration.

HSA is presenting two separate agreements to your Board for approval. This agreement is for an Implementation Plan for Business Intelligence and Data Analytics infrastructure. The second agreement submitted to your board under a separate Board item is for the software license, maintenance and training which is under a different division of IBI.

**DISCUSSION:**

The business intelligence solution will provide analytics tools and reporting structures for users to access relevant information immediately. IBI will install, configure and design data security for the software use and access. This pilot phase will be conducted in FY 2016 by importing data from various sources in order to develop reports and dashboards. Subsequent phases will expand upon this functionality to enhance self-service capabilities by merging additional data sources. Further development and refinement of dashboards for the various business units at HSA will be included in each phase. Each additional phase will cover another program area with a three month duration for each new dashboard, including training and knowledge transfer to HSA staff, culminating in a completed comprehensive implementation by June 2017.

The County's Information Services Department has reviewed and signed the Special Services Review Form.

The resolution contains the County's standard provisions allowing amendments of the County's fiscal obligations by a maximum of \$25,000 (in aggregate).

The agreement and resolution have been reviewed and approved by County Counsel as to form.

This agreement contributes to the Shared Vision 2025 outcome of a Prosperous Community by developing a state of the art software system that meets 90% of budget and schedule implementation milestones. The delivery of each software release is expected to pass user testing with less the 4% critical software defects.

**PERFORMANCE MEASURE(S):**

<b>Measure</b>	<b>FY 2015-16 Projected</b>	<b>FY 2016-17 Projected</b>
Defined project milestones met on time and within budget.	90%	95%
Percent of critical software defects (Severity 1) reported by users when testing each software release.	<4%	<4%

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**FISCAL IMPACT:**

The term of the agreement is November 3, 2015 through June 30, 2017. The amount of the agreement is \$940,000. The cost of the agreement will be cost applied out to HSA with funding estimated to be 70% state and federal, 30% net county cost. Budgetary appropriation for the agreement is included in the FY 2015-16 Adopted Budget and will be included in the FY 2016-17 Recommended Budgets.